**FINAL DRAFT (11.07.18)**

Adult Social Care

Scheme Review Guidance



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**Aim of Supported Living**

**Supported Living should support people with disabilities to live their lives with as much independence as possible in line with the Wellbeing principle under the Care Act 2014 and should aspire to Reach Standards (Paradigm 2002)**

**Reach standards -**

* I choose who I live with
* I choose where I live
* I have my own home
* I choose how I am supported
* I choose who supports me
* I get good support
* I choose my friends and relationships
* I choose how to be healthy and safe
* I choose how to take part in my community
* I have the same rights and responsibilities as other citizens
* I get help to make changes in my life

**Accountable:** Team Manager/Deputy Manager from the quadrant LD and Autism team / Complex Team

**Purpose/Outcome:** Decision to proceed with a Scheme Review or not

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**Steps:**

1. Arrange completion of the calculation spreadsheet through Delivery Support to ensure information matches that on A4W, email [DSOQueries@essex.gov.uk](mailto:DSOQueries@essex.gov.uk)
2. Check Mosaic/archived case file to gain an overview of support needs and current workers involvement
3. Contact provider to confirm details of scheme
4. Contact Commercial to discuss Scheme / Provider
   * Will a collaborative meeting between provider, Commercial and Operations be required prior to on-site scoping visit?
   * Are there any known current issues/concerns?
   * Is there a recommendation for a Scheme Review?
5. Carry out Collaborative meeting with Provider/Commercial/Operations to share the ‘Information for the Provider/Adult’ and address any concerns the provider may have.
6. If recommending a Scheme Review
   * Record rationale for decision under scheme profile information
   * Decide who will attend/lead on scoping visit
   * Decide who will co-ordinate and lead scheme review
   * Arrange date for scoping visit
7. Identify a scheme lead

**Accountable:** Scheme Lead from the quadrant LD and Autism team / Complex team

*(****A Scheme Lead is a person with comprehensive knowledge and understanding of the scheme review process; this could be a social worker, senior practitioner, Deputy or Team Manager****)*

**Purpose/Outcome:** Information gathering to inform the type and scope of the tasks that are required

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**Steps:**

1. Gather information for scoping document whilst on site
2. Consider insights and observations that can be inferred from the visit
3. Conclude visit with Provider, ensure they are aware of Scheme Review expectations and next steps
4. Evidence visit findings in scoping document

**Accountable:** Scheme Lead from the quadrant LD and Autism team / Complex Team

**Purpose / Outcome:** To mobilise the workers that will be undertaking the scheme based review and plan the Scheme Review approach

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**Steps:**

1. Identify how progress will be tracked
2. Prepare Plotting Scheme spreadsheets
3. Plan resources to complete Scheme Review
4. Meeting with the workers who are involved

* Share and discuss the Scheme Review Provider/Adult Information.
* Set out Scheme Review requirements
* Expectations of evidence based assessments
* Share information from commercial meeting and explain role of commercial in Scheme Review
* Share scoping document and discuss evidence gathered
* Identify issues and risks to Scheme Review
* Inform of case allocations
* Discuss Scheme Review documents and person centred tools
* Agree dates for future meetings to keep the scheme review on track
* Confirm how progress will be reported
* Agree roles and responsibilities
* Record agreed actions from the meeting for distribution

**Accountable:** Scheme Lead and Reviewers from the quadrant LD and Autism team / Complex Team

**Purpose / Outcome:** Information gathered evidence based re-assessments with individuals, informs proposals for potential re-modelling of support within a scheme.

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**Steps:**

1. Share the ‘Information for the Adult’ with the adult in a format that is compatible with their communication needs and levels of understanding.
2. Carry out an evidence based re-assessment of need underpinned and supported by technology where this is helpful.
3. Record all re-assessment information as it is gathered onto Mosaic.
4. Record needs on plotting spreadsheets.
5. Analyse plotting spreadsheets and information gathered to define core and individual support ensuring risks are effectively managed.
6. Draft proposals.
7. Consider who will be funding fixed AT solutions and the authorisation required.
8. Complete post review information on the calculation spreadsheet to represent proposed financial position of the scheme.
9. Agree proposed start date with Adult/Representative and Provider, provide information on the validation process and the ‘need agreed’

**Accountable:** Scheme Lead and Reviewers from the quadrant LD and Autism team / Complex Team

**Purpose / Outcome:** Agree that proposals for Implementation meet Adults identified needs and outcomes

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**Steps:**

1. If a Personal Budget/Direct Payments (remember Core Support is a managed service)
   1. Present your findings to the Adult/family etc.
   2. Request Proposal is shared with/seek approval to share Proposal with Provider.
2. If a Managed service,
   1. Present/send proposal to provider and share Plotting spreadsheets.
   2. Gather feedback to ensure all identified needs/outcomes have been captured and risks can be managed, including AT solutions for the individual and scheme.
   3. Present amended proposal to Adult and/or family/representative alongside the Provider if necessary. Gather feedback to ensure all identified needs have been captured and risks can be managed.
3. Amend proposal and plotting spreadsheets accordingly.
4. Update post-review calculation spreadsheet information.
5. Agree a start date for changes to take effect with Provider, in consultation with Commercial if required.
6. Agree date for follow up reviews with Adults/Representatives/Provider

**Accountable:** Scheme Lead and Reviewers from the quadrant LD and Autism team / Complex Team

**Purpose / Outcome:** Funding in place for packages to commence

**Steps:**

Assessor completes Assessment Part 2 on Mosaic (inc. Risk Assessment). If a Personal Budget/Direct Payment and there is no support plan or the current support plan requires review, support planning to be completed with Adult/Representatives.

1. Gain agreement from Adult/Representative that the support plan meets their identified need/outcomes.
2. Request validation of all adults support packages in one email to the Budget Holder attaching completed calculation spreadsheet and plotting spreadsheets as evidence of Increasing Independence and financial outcome of review intervention. If the case meets the criteria for validation through the exceptional needs forum the forum process must be followed.
3. Complete Request for Services on Mosaic.
4. Cross reference the Mosaic ID numbers for all Adults in the Information for Sourcing box. Request SPT progression of all support packages as a scheme to facilitate sourcing core support where relevant.
5. Send copy of authorised Validation e-mail to SPT Supported Living inbox and include cross-reference of all Adults Mosaic numbers and Scheme name. Copy validation authorisation to Mosaic case notes for each Adult
6. Inform SPT of contact from Service Provider to facilitate agreement of ‘draft confirmations of care’ in a timely manner.
7. Packages commence.

**Accountable:** Quadrant Specialist Accommodation Lead (SAL) and Reviewers from the quadrant LD and Autism team / Complex Team

**Purpose / Outcome:** Clear information about the scheme to support appropriate future placements

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**Steps:**

1. Finalise Plotting spreadsheets
2. Finalise Calculation spreadsheet
3. Complete Scheme Profile
4. Evidence that Onboarding process has been completed
5. Send scheme review process closure letter to Provider/Adult/Representative

**Accountable:** Scheme Lead / Reviewers from the quadrant LD and Autism team / Complex Team

**Purpose / Outcome:** Check package changes are meeting eligible need and represent best value

**Steps:**

1. Complete follow up Review to confirm that changes from last review continue to meet need and manage risk.
2. If changes are made to support, amend plotting and calculation spreadsheets. If no changes are made amend date of spreadsheets to evidence that these have been reviewed.
3. Action amendments to Scheme profile as required.
4. Notify the Commercial Team of any ongoing issues with Provider for their attention.



**This information is issued by**

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